

April 16, 2020 - FOLIO Holdings Report

Usability Working Group

Summary:

- This study had a total of 6 participants.
- Participants were identified by stakeholders

Task 1:

In Inventory, under the Instance search, search for the title City Dog. Open the instance record.

Task 1 Summary:

- Users had no trouble with this task and were able to complete quickly.

Task 2:

Find and open the holdings record. Change the "Temporary location" to "Vet." Then save it.

Task 2 Summary:

- 1/3 of participants scrolled through the instance record before finding the View Holdings button.
- 2/3 of participants found View Holdings button right away.
- 1/2 of participants needed prompts to know where to look to edit, others found it on their own with minimal scrolling.
- All participants found appropriate areas to edit and save.
- Most participants were confused when clicking "Save and Close" because it only closed the edit mode instead of taking them back to the instance record screen. Most relied on the browser's back button instead of the 'X' button.

Task 3:

Find and open the item record. Add a note (any type) in the Item record about the location change. Then save it.

Task 3 Summary:

- 1/2 of participants clicked on Item: Barcode trying to open the individual item record.
- All participants struggled a bit to find the item barcode to get into the item record.
- Once in the item record, all participants were able to add a note and save.
- 1/2 of users thought click 'Add Note' would save the note they just wrote.

Task 4:

In Inventory, under the Instance search, search for the title Cat news. Open the Instance record.

Task 4 Summary:

- Users had no trouble with this task and were able to complete quickly.

Task 5:

Edit the Instance record to add a "local statistical code" - Local: UT (User Testing 2020). Then save it.

Task 5 Summary:

- 1/3 of participants had trouble finding the edit icon for the instance record.
- 2/3 of participants recognized the same pattern to edit and found it easily.
- All participants were able to edit the statistical code and save.

Task 6:

Add a new Holdings record with the LC call number from the Instance record and the location "Vet." Then save it.

Task 6 Summary:

- All participants found the Add Holdings button easily.
- 1/3 of participants had trouble finding the call number area and were confused by the multiple boxes.
- All participants were able to add location and save.

Task 7:

Add an Item record with the following information:
Barcode = 9999[user #], Material type = book, Permanent loan type = Circulating, Add a staff only note with a message for us

Task 7 Summary:

- Most participants struggled with this task. These users scrolled through the instance record looking for a way to add an item.
- After creating a new Holdings record, the Holdings section is collapsed by default. Most participants did not realize they could click on that to expand it. Using the Expand All button at this point did not expand the Holdings section.
- Once Holdings was expanded, participants quickly found the Add Item button.
- In the item record, all participants were able to add all information and save.

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- Úæçipants had trouble identifying the item barcode as being clickable. Might be helpful to make that look more like other clickable items or create a separate Items section.

Website Screenshots:

Inventory | Agreements | Check in | Check out | Data import | eHoldings | eUsage | Finance | Apps | Mann Circulation

Search & filter: Instance | Holdings | Item

Keyword (title, contributor, identifier) Search

Reset all

Effective location

Language

Resource type

Staff suppress

Suppress from discovery

Inventory 8 records found

Title	Contributors	Publishers
City dog 1 / written and illustrated by Karla Kuskin.	Kuskin, Karla	Clarion Books (c1994)
City dog 2 / written and illustrated by Karla Kuskin.	Kuskin, Karla	Clarion Books (c1994)
City dog 3 / written and illustrated by Karla Kuskin.	Kuskin, Karla	Clarion Books (c1994)
City dog 4 / written and illustrated by Karla Kuskin.	Kuskin, Karla	Clarion Books (c1994)
City dog 5 / written and illustrated by Karla Kuskin.	Kuskin, Karla	Clarion Books (c1994)
City dog 6 / written and illustrated by Karla Kuskin.	Kuskin, Karla	Clarion Books (c1994)
City dog 7 / written and illustrated by Karla Kuskin.	Kuskin, Karla	Clarion Books (c1994)
City dog / written and illustrated by Karla Kuskin.	Kuskin, Karla	Clarion Books (c1994)

End of list

Instance record City dog 4 / written and illustrated by Karla Kuskin. Clarion Book...

Instance record unspecified

City dog 4 / written and illustrated by Karla Kuskin.

Holdings: Olin > PZ8.3.K97 C5 1994

Item: barcode | Status | Material type | Enumeration | Chronology

999999125	Available	Book	-	-
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Add holdings

Administrative data

Record last updated: 3/26/2020 4:38 PM

Instance HRID	Metadata source	Cataloged date	
in0000000007	FOLIO	-	
Instance status term	Instance status code	Instance status source	Status updated date
-	-	-	-

Mode of issuance

Statistical code type	Statistical code	Statistical code name
-	-	-

Title data

Resource title

City dog 4 / written and illustrated by Karla Kuskin.

Alternative title type	Alternative title
Other title	User testing task 1, user 4

Index title

City dog 4

Inventory | Agreements | Check in | Check out | Data import | eHoldings | eUsage | Finance | Apps | Mann Circulation

Holding record Olin PZ8.3.K97 C5 1994

Instance: City dog 4 / written and illustrated by Karla Kuskin., Clarion Books, c1994

Collapse all

Administrative data

Record last updated: 4/15/2020 5:05 PM

Holdings HRID	Former holdings ID
ho00000005209	-
Holdings type	-
Statistical code type	Statistical code
-	-

Location

Holdings location

Permanent	Temporary			
Olin	Vet			
Shelving order	Shelving title			
-	-			
Holdings call number	Call number type	Call number prefix	Call number	Call number suffix
Copy number	Library of Congress classification	-	PZ8.3.K97 C5 1994	-

Holdings details

Holdings notes

Electronic access

Acquisition

Receiving history

Instance: City dog 4 / written and illustrated by Karla Kuskin... Clarion Books, c1994
Holdings: Olin > PZ8.3.K97 C5 1994

Item record Book Available

Effective location for item **Effective call number string**
Vet PZ8.3.K97 C5 1994

[Collapse all](#)

^ **Administrative data**

Record last updated: 4/15/2020 5:06 PM

Item HRID	Item barcode	Accession number
it00000005191	999999125	-
Item identifier	Former identifier	-
-	-	-
Statistical code type	Statistical code	-
-	-	-

^ **Item data**

Material type
Book

Item call number	Call number type	Call number prefix	Call number	Call number suffix
-	-	-	-	-
Copy number	Number of pieces	Description of pieces	-	-
-	-	-	-	-

^ **Enumeration data**

^ **Condition**

^ **Item notes**

Staff only	Note
No	Temporary location change to VET 4/15/20

^ **Loan and availability**

[Add language](#)

Publication frequency

[Add frequency](#)

Publication range

[Add range](#)

^ **Instance notes**

Notes

Note type	Note	Staff only
Summary	A rhyming tale of a city dog's first outing in the country	<input type="checkbox"/>

[Add note](#)

^ **Electronic access**

Electronic access

[Add electronic access](#)

^ **Subject**

Subjects

Dogs--Juvenile fiction	✎
Nature stories	✎
Dogs	✎
Fiction	✎
Juvenile works	✎

[Add subject](#)

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In Inventory, under the Instance search, search for the title City Dog [user #]. Open the instance record [double click on the result]

In Inventory, under the Instance search, search for the title City Dog [use...
▲

Typed it in and searched, found the record right away.

Typed it in and clicked on the search button. Was able to open the instance record.

Typed it in and clicked on the item to open the instance record

Typed it in and clicked on search. Clicked on the instance record and it opened.

Opened Inventory, typed in for the search and found it.

Goes directly to inventory and searches for the title, then clicked on the item to open up the record.

Find and open the holdings record. Change the "Temporary location" to "Vet." Then save it.

Find and open the holdings record. Change the "Temporary location" to "Vet..."

Went right to View Holdings and clicked on it. Looked around the page for a moment but then found the pencil icon for edit. Was able to scroll down and find the temp location, typed in vet and selected it. Then saved and close right away.

Was looking through the instance record - clicked on View Holdings and it went to the holding record, scrolling through the sections - found the locations and not sure how to change that at first, found the pencil in right corner and found the editing screen then went to location - started typing for the autofill and selected Vet - then saved and closed it. Confirmed that the temp location was set to Vet.

Tried clicking on the drop down of Holdings and then found and clicked on View Holdings. Is looking for somewhere in the body of the holding record for a way to adjust the temporary location. Needed prompted to find the edit...used the drop down on the Holding Record name and then clicked on Edit. Searched for Vet and then clicked save and close.

Scrolling through the list of items in the instance record looking for holdings. Keeps looking at Title data and below and trying to click on things that are not links. Finally found the way to the Holdings area and clicked on the item record. Can't see the View holdings because of the Zoom video items. Got that minimized and then clicked on View Holdings. Scrolling through the entire record before changing the Temporary location. Looking for the save box, doesn't see it right away and then found it in the upper right corner. Clicked on Save and it didn't do anything, had to scroll to find the error and then re-save.

Found the View Holdings button right away. Scrolling up and down looking for the edit options. Needed a prompt to look higher and then had to have another prompt to keep going higher. Found the pencil icon and was hesitant to click but then clicked. Had to be directed to scroll further down but then found the location. Was able to easily save. To go back to the instance record, clicked the back button.

Clicked on the View Holdings and was able to find the pencil icon to edit and then select temporary location. Scrolled through to find instead of searching. Hit save and close.

Find and open the item record. Add a note (any type) in the Item record about the location change. Then save it. [will need to save & close or close and select save at prompt].

Find and open the item record. Add a note (any type) in the Item record abo...

Was scrolling through the page to find how to get to the item record. Found the close button and then found item record after the close button. Found the edit button and added a note. Saved and closed.

Was in the holding record and clicked on the edit - then clicked on the 'x' to get out of edit - struggled a bit trying to click back button and Inventory icon - Expanded Holdings section and then scrolled down to see what the options are - tried clicking on Item: barcode to - took some prompting to get to click on the item name itself - was a bit confused it took over the whole screen - going with the edit icon at the top right again and then scrolled down to find the note, added the note type, set to staff only, and wrote a note. Hit add note and expected it to save but then did save and close.

Was able to find the items area but then clicked on item:barcode a couple of times before getting to the actual barcode. Was able to easily get into edit this time and then found the note. Clicked Add Note to try and save the note. And then save and closed. Used back button multiple times to go back to the instance record.

Trying to go back to the instance record, clicked on Inventory in the menu bar to go back to that page, had to research. Looking for the item record and clicked on View Holdings, then went back. Then saw the barcode and clicked on it for the item record. Went to the item record title and then edit again, scrolled down and added a note. Clicked on Save and it kept the note in there but didn't select a Note Type. It allowed save the first time but then didn't display on the front end - error maybe?

Looking for the item record, scrolled down to look at things and then found the item barcode and clicked on it. Went right to the pencil for editing. Scrolled down to Notes and clicked Add Note, selected Note, and then typed it in. Then saved and closed right away.

Had to be directed to the close 'x' button but then made it back to the instance record and clicked on the Item: barcode before selecting the barcode itself. Not sure how to get into the edit mode, scrolled through the page and keeps hovering over things and not getting to it. Needed to be directed toward the top of the page to see what could be clicked on. Was able to add the note and save.

Any additional comments about updating holdings and item records?

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After a couple of times thinks they'll be used to it.

Save and close - as long as people know it closes edit mode but doesn't take you back to the instance record.

Very first time is pretty overwhelming but will be easier when they get used to it.

A lot of it is common sense, like being in edit mode to do stuff. Just takes some going around to understand and didn't find it too difficult at all.

Might expect something that says Item as well as Holdings to be able to see if that exists. A bit confused as to when things take over the whole screen and when they become another panel. There's a lot of info in the instance record not used to seeing but things that they think they'll just need to get used to over time

Found the prompt by note and was able to find it easily but did make sense once you looked at it.

In Inventory, under the Instance search, search for the title Cat news [user #]. Open the Instance record [double click on result].

In Inventory, under the Instance search, search for the title Cat news [use...

Was able to search and got a little confused with the previous record still being up. Then was able to open it.

Searched the instance record and found it.

Was able to search and find that and open the instance record easily.

Found inventory and searched to get the instance record.

Did the search and opened the instance record

Title searches going smoothly (possibly due to low number of items in system)

Edit the Instance record to add a "local statistical code" - Local: UT (User Testing 2020).

Then save it. [Save changes].

Edit the Instance record to add a "local statistical code" - Local: UT (Use...

Found the statistical code right away, found the code, and then saved and closed.

Saw the pencil to edit the instance record in the upper right corner and went into editing the instance. Scrolled through to look for the statistical code. Missed it the first time and scrolled through the page but then found it, changed, and saved.

Having trouble finding the edit again and scrolls through the whole instance - then made to hover over the instance title - asked if it should be clicked on and then did and found the edit. Was able to easily find statistical code and save.

Looking for the edit, first went back to 2nd panel in the inventory to try to find the edit. Clicked on the New instance record button. Had to go back because it wasn't editing. the correct place. Had to keep looking around but then finally found the instance record title and the edit button. Found the statistical code and saved.

Found the edit icon and then went to the statistical code. Scrolled through the list and found it. Did the add statistical code to try and save but then remembered to click save and close.

Found the edit icon same as before, then scrolled through looking for the statistical code - scroll back up and then found the button to add. Selected code and then saved.

Add a new Holdings record with the LC call number from the Instance record and the location "Vet." Then save it.

Add a new Holdings record with the LC call number from the Instance record...

Clicked on Add Holdings right away. Scrolled down through the page looking for it and then had to go back up. Found call number and typed it in but then had to be prompted to change the type. Scrolled up a bit and found the location. Then saved and closed.

Clicked on Add Holdings, scrolled down the page looking for call number and then back up, then found the dropdown. Selected the LC and put in a call number. Scrolling down through the page to look for location, then back up and found it. Searched for vet and put that in and saved.

Found Add Holdings and was able to change call number type but seemed to be confused by the different boxes for different numbers. Easily found the location and then was able to save and close.

Found the new holdings button and a call number to add in there. Saved.

Clicked on Add Holdings - then went and found the location - found the call number type and added a random call number. Wasn't sure if it would need a call number prefix or suffix.

Clicked on Add Holding - then searched in the location to be able to do that. Was able to get the call number but it was difficult and got off track because could not copy from the instance record.

Add an Item record with the following information:Barcode = 9999[user #]Material type = bookPermanent loan type = CirculatingAdd a staff only note with a message for us

Add an Item record with the following information:Barcode = 9999[user #]Mat...

Clicked on New in the Inventory but that was for the instance record. Then went to the Items under the search and wanted to click on the New button there. Directed back to the instance record but couldn't see an add item. Tried Collapse All and then Expand All but Holdings didn't expand. Had to be directed to expand the Holdings (should be auto-expanded after created). With that expanded, found Add Item right away. Was able to find all of the information on that screen. There was a bit of scrolling to find the note but then was able to click Add Note and found all the staff only information checkbox quickly. Saved and closed.

Looking for the new item and closed the instance record, then had to go back into it. Was directed to expand Holdings and then saw Add Item. Found barcode, material type easily. Scrolled down and found loan type. Scrolled back up and found note right away, selected Staff only, then type of note and added note. Then saved.

Scrolling through the instance record to look for the item record but then went back to the top and but not sure where to do it. Was prompted to expand the holdings and then found the way over to add item when asked what looked clickable. Was able to find all of the information with just a little effort to scroll and find things. Easily added note and clicked staff only.

Had to scroll through and then back up to expand Holdings and found the Add Item button. Was able to find all of this information easily,, just had to keep scrolling to find all of the fields. Had a little trouble seeing the Staff Only checkbox for the note but then found it with a slight prompt.

Scrolled through the instance record trying to look for something to add that. Holdings didn't expand all the way on the first click - then found the Add Item button - navigated through the record addition - just kept scrolling to find what was necessary to be filled out. Then was able to save - did get an error that the barcode was already taken and resolved.

Was able to find all of this.

Any additional comments about updating instance records/adding holdings and item records?

Any additional comments about updating instance records/adding holdings and...

This was a bit too much because of how new it is. Does still think they'll need to have more exposure to grasp these flows.

It's a bit difficult to understand when items are expanded and when they aren't. Not sure if it would still be an issue on a larger screen or not.

It is easy but first time for it is a little more difficult with not being prepared.

Did have a little bit of trouble finding the instance record edit and thought it would be helpful to have a different edit button (then was told about the pencil icon).

Note that the participant was using a tablet to navigate with this test. Not sure about the up/down pointing caret to know which ones mean it's expanded or not. Not always intuitive to know if everything is displayed or not.

End of Report